



Assessment Change Request Process

**PFR Training
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Assessment Change Request Process

- Old process is being revisited - there are numerous opportunities for improvement
- Change to process will help minimize errors and help us meet assessment deadlines.

Assessment Change Request Process

- What we can't change
 - Competency Center procedures (but we are visiting them next week and will voice our ideas)
 - System functionality
 - Problems with system interfaces which impact how and when consumption data is available in BW (i.e. - Current ALDS interface – hoping for solution this month)

Assessment Change Request Process

- What we CAN change
 - The **TIMING** of incoming requests for changes – to smooth out work flow.
 - The **QUALITY AND CLARITY** of data coming in - to provide for more accurate results.
 - **COMMUNICATION FLOW** - to ensure common understanding of process/consumption bases and reduce confusion.

Assessment Change Request Process

TIMING

- Change requests will be due, in approved format, by the **20th** of each month. If that day falls on a weekend, due date is preceding work day. WYE changes need to be signed by OUM – no change. If necessary, hand deliver change requests to Assessment Team – BLDG 1001 – Erica Callahan/Cathy Sisk.
- This will give assessment analysts more time to enter changes into the system and run quality checks to ensure the data is accurate prior to deadline.
- We do not want to run assessments up to the last minute – in February, analysts completed assessments with only 7 minutes remaining to deadline.
- SAP assessment process is very detailed – and our pool structure requires that we run 36 FY06 cycles in very specific order to ensure accuracy. Last minute changes impact that schedule and sometimes, due to the domino affect of required runs, require starting assessments over from the beginning.

Assessment Change Request Process

QUALITY AND CLARITY

- **New templates needed to request multiple changes.**
- **New templates needed to guide you to give us ALL the data elements needed to enter cycles correctly.**
- **New forms need to be very clear so that:**
 - **you understand what information we need; and**
 - **you know where to get that information if you don't have it..**

These changes were made to satisfy these needs and hopefully strengthen the process.



Assessment Change Request Process

THE FORMS

Submit either:

Basic Form (Assessment Change Request Form) – for single request

or

Basic form **with template to document multiple requests:**

Multiple Manual Assessment Adjustments Template

Multiple Consumption Data Adjustment Template



The Basic Form Assessment Change Request Form

Location:

**OCFO Website – “Frequently Used Forms”
hotlink - to the side**

<http://ocfo.larc.nasa.gov>



HOT LINKS

- + iView
- + IEMP
- + OCFO Activities Calendar
- + Travel Information
- + Payroll Information
- + Full Cost Principles & Policies
- + Metrics
- + Workforce
- + Tools
- + Frequently Used Forms
- + Financial Users' Network

[Home](#) » **Frequently Used Form**

- [Assessment Change Request Form](#) (PDF)
- [Multiple Manual Assessment Adjustment Template](#) (XLS)
- [Multiple Consumption Data Adjustments Template](#) (XLS)
- [Funds Distribution Form](#) (XLS)
- [Labor Correction Processing Form](#) (XLS)
- [NF 1700](#) (PDF)

The **Basic** Form

Assessment Change Request Form

- **Always required** to provide at minimum basic data at the top and OUM signature at bottom for WYE changes.
- Information regarding fund center, commitment item, etc. in center block is **only** to be filled out **if it is a single request**.
- **If multiple** request, fill out top portion, get signature documented if WYE change and **attach** one of the new change templates.
- Mail or hand deliver forms to MS937/Assessment Analyst so that they are **received by** the 20th of the month, or earlier.
- Deadlines will be strictly imposed.

The Basic Form

Assessment Change Request Form

- S&E Pool consumption change requests: If you are making a change to consumption data for S&E Pools – we already know G&A Pools are also affected – we will make those changes.

Please do **not** document these G&A changes for us – as it may create confusion as to your intent.

- If you do have G&A changes however, which have nothing to do with your S&E consumption changes – a new area is added to the basic form to let us know if that is the case.

The Basic Form

Assessment Change Request Form

Functional Area is required – Where is that?

See file in OCFO Website – under “tools” hotlink to the side, select “Projected Funding Requirements (PFR) Tool (xls).

Note separate sheet for PY05 and PY06 authority – Functional Areas will be different depending on funding. **We’ve seen some come in with 05 Functional Areas indicated for 06 WBS’s.** This will cause the assessment cycle to crash midstream..

Multiple Manual Adjustment Template

Manual Adjustment Template - Dollars \$

(Changing Past Assessments)

Revised 03/2006

Instructions:

1. Select the appropriate template for PY05 or PY06 adjustment and complete each field of requested information. If you are unsure what information is needed in a particular field contact your RM analyst for clarification. PY05 and PY06 adjustments should be submitted on seperate forms.
2. Delete the instruction rows, example row and the appropriate PY05 or PY06 template that is NOT being used.
3. Save file, print and attach it to your Assessment Change Request Form.
4. Send the Assessment Change Request Form and the completed template to the Assessment Analyst, MS 937, to be received no later than COB of the period cutoff date (20th of each month).

Example PY05 Adjustment

From					To			
	Cost Center or WBS	Fund	Functional Area (in PFR - see OCFO website)	Cost Element (9000.####)	Dollar Amount	Cost Center or WBS	Fund	Functional Area (in PFR - see OCFO website)
EXAMPLE	23FABIHSUM	ESAX22005D	UA	9000.6000	17070.00	23-064-10-10	ESAX22005D	268

Example PY06 Adjustment

From					To			
	WBS	Fund	Functional Area (in PFR - see OCFO website)	Cost Element (9000.####)	Dollar Amount	WBS	Fund	Functional Area (in PFR - see OCFO website)
EXAMPLE	109431.07.01	ESAX22006D	835A	9000.5235	100.50	921266.04.07.07	ESAX22006D	922A

Multiple Manual Adjustment Template

- Only required if requesting multiple manual adjustments – single manual adjustments can still be documented on the basic form.
- Provide both “FROM” AND “TO” INFORMATION – eliminates confusion. Often missing.
- Requires WBS or cost center (PY05 only). **Ensure your WBS is valid..** We won’t know until cycle runs and error kicks out - then whole cycle has to be started over again (taking up to an hour) .
- Require commitment item (9000.xxxx) – often missing.
- Requires Functional Area – see prior comment as to where to get it..(Often missing)
- Dollar amount of change – whole dollars..



Consumption Data Adjustment Template - For WYE or Guideline Changes

Instructions:

- ### EXAMPLE

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Multiple Consumption Data Adjustment Template

- **Only required if requesting multiple consumption adjustments – single adjustments can still be documented on the basic form.**
- Requires current period (i.e. – February is period 5)
- Indicate whether the change is retroactive – Y or N (new)
- Require WBS element - need to be valid.
- Requires associated fund.
- Requires pool identification.
- Requires Functional Area – see prior comment.
- Requires NEW WYE OR GUIDELINE TOTAL – NOT THE DELTA

New aid – spreadsheet of current WYE totals by WBS will be available in the RM server – Assessment folder - WYE Subfolder. Prior information combined WYE totals with FTE totals.

Assessment Change Request Process

Communication flow

We are almost through $\frac{1}{2}$ of the year and are committed to this process.

We want to work on lessons learned this year before beginning of next fiscal year – i.e. – spring/summer.

If you have any ideas or issues you would like to raise, please email the assessment team – so that we can discuss before next year.

If you find the forms confusing, let us know – tell us specifically what you don't understand and we will provide tools to give you the information you need to prepare the change requests completely and accurately.

Assessment Change Request Process

QUESTIONS??????

What's coming up.....

- **We are going to competency center next week for a workshop and concerns will be voiced and hopefully some answers to process problems will be obtained or resolved.**
- **ALDS interface problem - hope to have fix this month.**